User Guide for User and Account Management Virginia EIMS Project (Virginia Educational Information Management System)
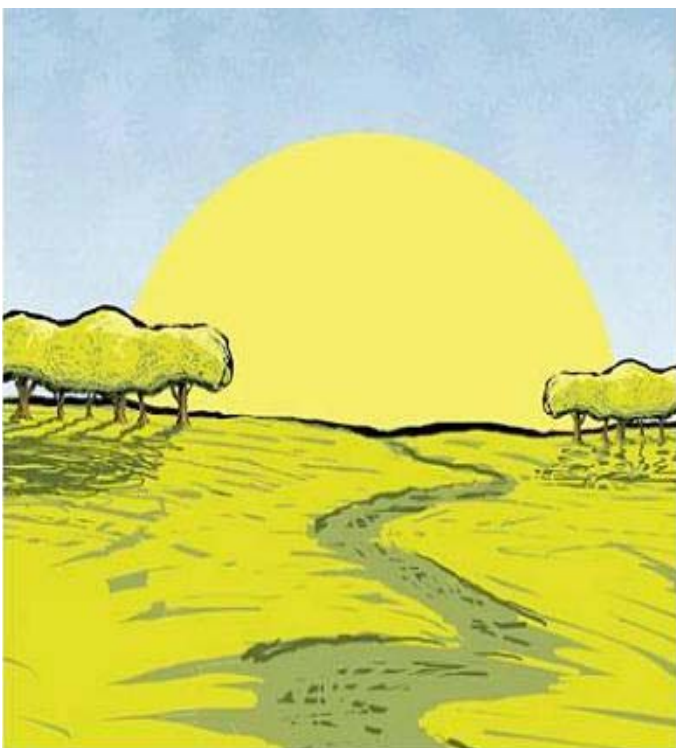
PEARSON
Educational
Measurement

<u>Table of Contents</u>

Welcome to the *User Guide* for the Virginia Education Information Management System Account Management module. This User Guide will step you through the following activities:

➢ Website Navigation
➢ Security
➢ Authorization to Account Management Privileges

The User Guide uses a task-oriented approach. That is, it provides a step-by-step illustrated process for completing distinct tasks within Virginia EIMS Account Management module. Each of these tasks is identified in the Table of Contents.

1.0   Introduction

Scope

The Virginia EIMS Account Management module has the following basic components:

- Logging into EIMS
- Logging out of EIMS
- Editing Your Account Page
- Forgot Password Wizard
- Creating an Account
- Editing an Account
- Unlocking an Account
- Security Roles

2.0   Logging into EIMS

The Reporting Solutions system is the gateway to accessing Virginia EIMS. To login, follow these steps:

1. Go to http://www.VirginiaEIMS.com to directly access the Virginia EIMS specific login page.

2. Click on the *Log In* button in the graphical header section of the main page to display the Sign In page. (See Figure 1)
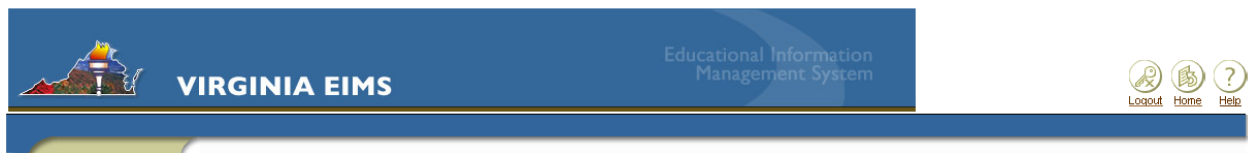

Figure 1 - Common Page Header

The page header depicts Virginia EIMS logo and contains three standard buttons, Logout, Home and Help. The page is accessed through a Login link on the EIMS home page or by simply accessing the http://www.VirginiaEIMS.com URL which directs the use to the Virginia specific login page **(See Figure 3)**. Upon clicking the link, the user is directed to the Login page shown below.

3. The *Log In* Page is displayed. (See Figure 2)

Reporting Solution - Microsoft Internet Explorer

File   Edit   View   Favorites   Tools   Help

VIRGINIA EIMS   Educational Information Management System

LOG IN

To ensure security, please type your User Name and password below. Then, click Log In. If you leave the system idle when logged in, you may be required to log in again.

Please note: User names and password are case sensitive and to ensure the security of your account, your logon will timeout after 30 minutes of inactivity.

User Name

Password

Log In   Cancel

Forgot password?

Done   My Computer
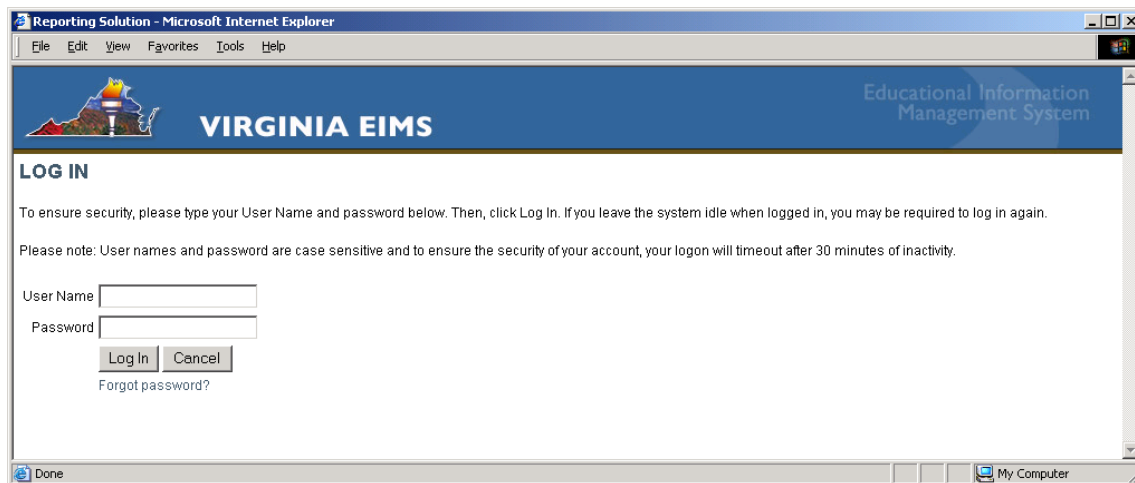
Figure 2 - Client-Specific Login Page

4. Enter your user name in the *User Name* text box and enter your password in the *Password* text box.

5. Click on *Log In* to access the Virginia EIMS Home Page.

6. If you decide not to *Log In*, click on the *Cancel* button. The previous page is displayed.

7. Once logged into EIMS, all pages continue to display the Virginia State logo in the upper left-hand corner.

Rules around user passwords are the following:
- EIMS will lock a user out after the 5th consecutive attempt with any given User Name.
- After 5 consecutive failures a manual password reset is required.
- Users will be forced to change their password every 120 days.
- Users are required to change their password upon their first login to the system.
- Users are not allowed to re-use any of their last 2 passwords.
- EIMS will display a message denoting that the user's password is going to expire within 10 days and will send an email denoting that the password is going to expire within 10 days prior of the date of expiration.
- Passwords within the EIMS system are not allowed to be identical to the User Name
- Users are allowed 3 grace logins once the passwords have expired.

If the user's password is not set to expire soon, and the single sign-on server successfully verifies the user name and password it redirects the user to the success URL of the application. If authentication fails, the server displays an error message and redirects the user back to the login page. The Cancel button returns the user to the unauthenticated home page.

The Login page includes a Forgot Password link which is discussed in section 4.

The space above the User Name field is reserved for system messages. If authentication fails for any reason, a message is displayed. The following table shows potential system messages during authentication.

Event	Message
Invalid name	Error: Authentication failed. Please try again
Invalid password	Error: Authentication failed. Please try again
Today's date < user start date	Error: Authentication failed. Please try again
Today's date > user end date	Error: Authentication failed. Please try again
Account disabled	Error: Authentication failed. Please try again
Five (5) consecutive failed login attempts	Error: Your account is locked. Please notify your account manager.

Table 1 - Login Error Messages

If the user's password is set to expire soon, see Your Account Page below, the single sign-on server presents the Your Account page instead of the Login page. This page enables the user to change password.

Upon successful login the system checks if the user has agreed to the usage terms. After logging into the system for the first time the user is directed to the Agreement page if usage terms have changed; in this case, clicking the Accept button directs the user to the Virginia EIMS Home page.

On the Agreement page, the user must click the Accept button to go on to the Virginia EIMS home page.

Figure 3 - Confidentiality Statement Page

The Decline button returns the user to the Login page.

3.0   Your Account Page

The Your Account page is accessed by one of the following methods:

1. Clicking the Your Account link, visible on the main navigation toolbar after the user is successfully logged on.

2. Upon the very first successful login to EIMS the user is directed to this page.

3. When the password expires. In this case, a password expired message is displayed on top of the screen, see messages table below.

4. When password is about to expire soon, i.e. within the 'Password Expiration Warning' period. In this case, a password expiring soon message is displayed on top of the screen, see messages table below.

This page is used to change password, set password hint/answer and email address. The Change Password page is shown below.

Figure 4 - Your Account Page

Details for each field are provided in the following table:

Field Name	Date Type	Required	Business Rules
Original Password	Character	Y	Minimum 8 characters. Maximum 30 characters.
New Password	Character	Y	Minimum 8 characters. Maximum 30 characters.
Confirm New Password	Character	Y	Minimum 8 characters. Maximum 30 characters.
Password Hint	Character	Y	
Answer to Password Hint	Character	Y	
Email Address	Character	Y	
First Name	Character	N	
Last Name	Character	N	

Table 2 - Your Account Fields

When the user clicks the Cancel button, control is returned to the originating page. When the user clicks the Submit button, required fields are verified. In addition, the password entered is checked for compliance with the password policy parameters stored within EIMS. If an error is encountered during validation, a message is displayed on the line above Change Password label. The following table shows potential system messages during validation.

Event	Message
Invalid password	Error: Password policy violation
Missing mandatory field	Error: Mandatory field needs to be entered
Password has expired	Error: Your password has expired. You are now in the grace login period. Please change your password.
Password is about to expire	Error: Your password is about to expire. Please change it.

Table 3 - Your Account Error Messages

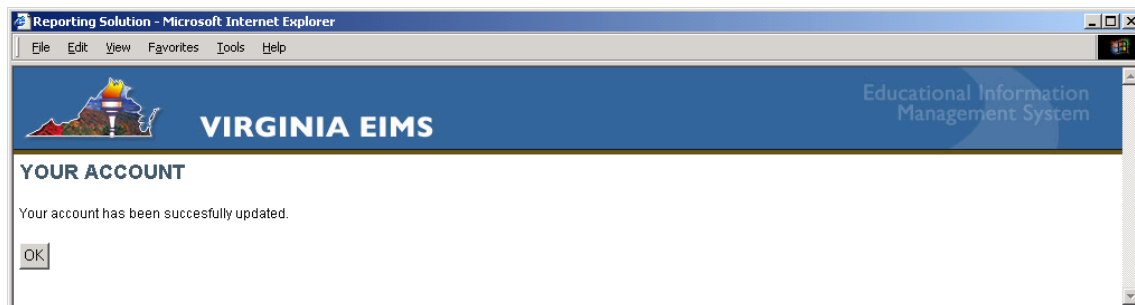If the user enters a valid password a confirmation page is displayed as shown below.

Figure 5 - Your Account Confirmation Page

Clicking the OK button returns the user to the originating page.

The Change Password page is accessed by one of the following methods:

1. The user is directed to this page upon the very first logon.

2. When password expires. In this case, a password expired message is displayed on top of the screen.

3. When password is about to expire soon, i.e. within the 'Password Expiration Warning' period. In this case, a password expiring soon message is displayed on top of the screen.

This page is used to change the user's password. The Change Password page is shown below.

Figure 6 - Change Password Page

When the user clicks the Cancel button, control stays on the same page. When the user clicks the Submit button, required fields are verified. In addition, the password entered is checked for compliance with the password policy parameters stored in EIMS. If an error is encountered during validation, a message is displayed on the line above User Name label. The following table shows potential system messages during validation.

Event	Message
Invalid password	Error: Password policy violation
First logon	Error: You must change your password before you can continue
Password has expired	Error: Your password has expired. You are now in the grace login period. Please change your password.
Password is about to expire	Error: Your password is about to expire. Please change it.

Table 4 – Change Password Error Messages

Upon successful login the system checks if the user has agreed to the usage terms. If not the Account Setup page is displayed; otherwise, the home page is displayed.

4.0   Forgot Password Wizard

In order for the Forgot Password link to work, the user must have logged on successfully at least once and set her password hint and answer. This is done using the Your Account page, discussed above. The Forgot Password page consists of a 3-step wizard as follows:

Step 1. Confirm Identity – this page has one field, User Name and two buttons, Next and Cancel. The user types the user name, *case sensitive*, and then clicks on Next to go to the second step. The cancel button returns the user to the Login page.
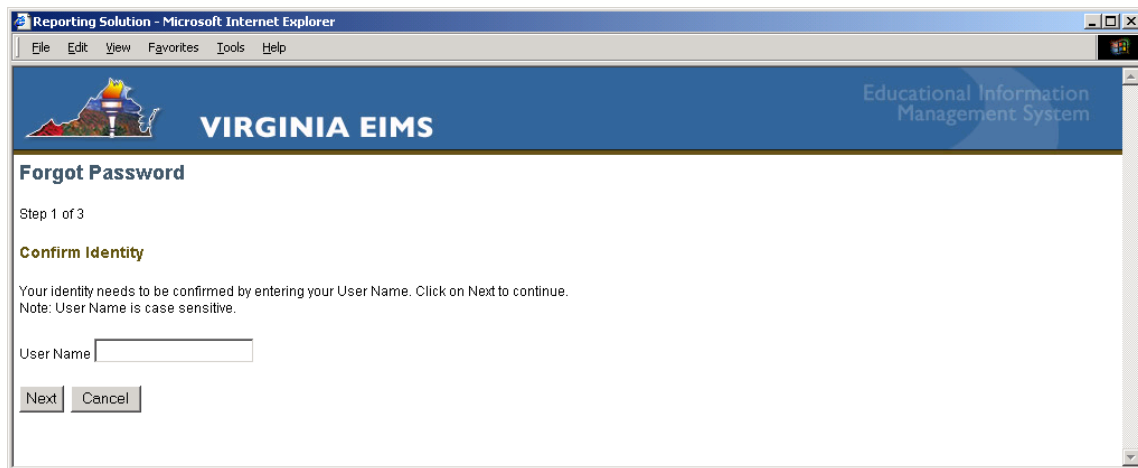

Figure 7 - Forgot Password Page Step 1

If the user enters an invalid user name, then an error message is displayed on the same page above Confirm Identity label.

Step 2. Confirm Additional Personal Information – this page has one field, Password Hint and three buttons, Back, Next and Cancel. The user enters the answer to the password hint, *NOT case sensitive*, and then clicks on the Next button. The page then checks the password hint answer stored internally within EIMS. If the user types the correct answer, the next page is displayed. Otherwise, an error message is displayed and control returns to step 1.
Clicking on the Back button returns the user to step 1. The Cancel button returns the user to the Login page. The user clicks the Next button to go to step 3.

Note: If a user forgets their password even after their dedicated hint has been presented to them, they are able to call the Pearson EIMS Help Desk at 1-888-269-5242 to have it reset.

9

Figure 8 - Forgot Password Page Step 2

Step 3. Reset Password – this page has two fields, New Password and Confirm New Password, in addition to the three buttons Back, Next and Cancel. The user enters New Password twice for confirmation. The password is displayed as asterisks (*******).

If the password matches the password confirmation and adheres to the password policy parameters then a success message is displayed. Otherwise, an error message is displayed, 'Failed to reset your password', and control stays at the same page.

Clicking the Back button returns the user to step 2. Clicking the Cancel button returns the user to the Login page.

Figure 9 - Forgot Password Page Step 3

Upon successfully resetting the password, the following confirmation page is displayed.
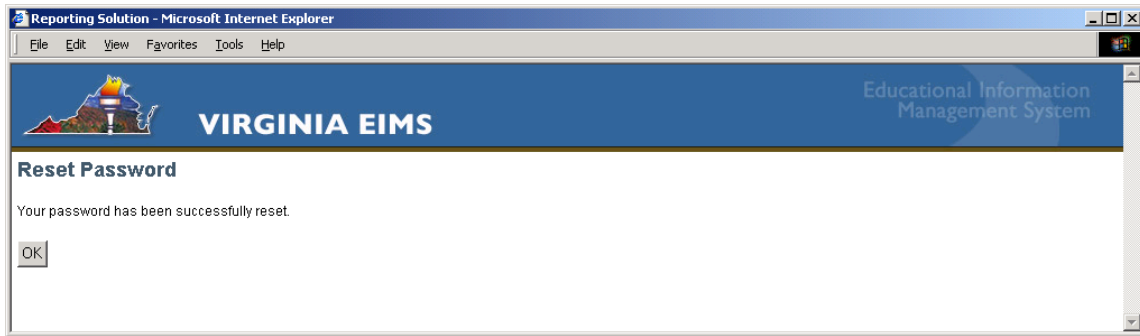
Figure 10 - Reset Password Confirmation Page

Clicking the OK button returns control to the Login page.

The following table shows potential system messages during the Forgot Password process.

Event	Message
Invalid user name	Error: Invalid User!
Wrong password hint	Error: Failed to confirm additional personal information!
Invalid password	Error: Failed to reset your password
Confirm password doesn't match	Error: Failed to reset your password

Table 5 - Forgot Password Error Messages

Note: If a user password expires, they are able to call the Pearson EIMS Help Desk at 1-888-269-5242 to have it reset and re-enabled.

Account Administrator's Section

5.0 Create Account Page

This page is only accessible by users who are members of the Account Managers Group: State Account Managers, Division Account Managers and School Account Managers in the future. The Create Account page is shown below.

Figure 11 - Create Account Page

Details for each field are provided in the following table:

Field Name	Date Type	Required	Business Rules
User Name	Character	Y	30 characters maximum
Email Address	Character	Y	
First Name	Character		
Last Name	Character		
Is Enabled	LOV		Select ENABLED/DISABLED from list. Default to ENABLED. User will not be able to login if this field is set to DISABLED.
Start Date	Date		If set, user can only login on or after Start Date.
End Date	Date		If set, user cannot login past End Date.
Role	LOV	Y	Select from LOV. See below for further details.
Division	LOV		Select from LOV. See below for further details.
School	LOV		Select from LOV. See below for further details.

Table 6 - Create Account Fields

12

Security Roles Access Details

1. **School User:**
   - **Not available until file management and student resolution has been completed.**
   - Access to aggregated data and student level data for all students within the school.

2. **Division User:**
   - **Not available until file management and student resolution has been completed.**
   - Access to aggregated data and student level data for all students within the division.

3. **School Administrator:**
   - Access to File Management and Student Resolution for all students within the school.
   - Access to aggregated data and student level data for all students within the school.
   - Access to File Management and Student Resolution will be removed after Student Resolution has been completed.

4. **Division Administrator:**
   - Access to File Management and Student Resolution for all students within the division.
   - Access to aggregated data and student level data for all students within the division.
   - Access to File Management and Student Resolution will be removed after Student Resolution has been completed.

5. **State Administrator :**
   - Access restricted to non-student level reporting. (i.e. these users **will not** have access to student longitudinal reports).
   - Reports will reflect aggregated data for all students in all divisions and/or schools.

The Organizational Details Lists of Values (LOVs) are populated based on the logged user.

If the logged user's Role is State Account Manager, then the List of Values (LOV) are populated as follows:
- Roles – all roles except State Account Manager
- Division – all divisions
- School – all schools within selected division

If the logged user's Role is Division Account Manager, then the List of Values (LOV) are populated as follows:
- Roles – all roles except Division Account Manager and all State roles
- Division – default and restricted to the user's division
- School **– all schools within the user's division**

If the logged user's Role is School Account Manager (reserved for future user), then the List of Values (LOV) are populated as follows:
- Roles – only school roles except School Account Manager
- Division – default and restricted to the user's division
- School **– default and restricted to the user's school**

If a State level role is selected, i.e. State Account Manager or State Admin; then the Division and School fields become disabled to designate a State Account Manager or State Admin role.

If Division level role is selected, i.e. Division Account Manager or Division Admin; then School field becomes disabled to designate Division Account Manager or Division Admin role.

If School level role is selected, i.e. School Account Manager, School Admin or Teacher; then all three organizational fields *must* be selected.

The Cancel button returns the user to the originating page. The submit button performs the following:
1. Validate required information
2. Generate random 8 characters long password
3. Create entry internally within EIMS
4. If user's role is account manager, then add the user to the Account Managers Group
5. Create entry in EIMS database, see further technical details below
6. Send email to user with new account information

Upon successful creation of the user's account a confirmation page 'Account Created' message is displayed as shown below.
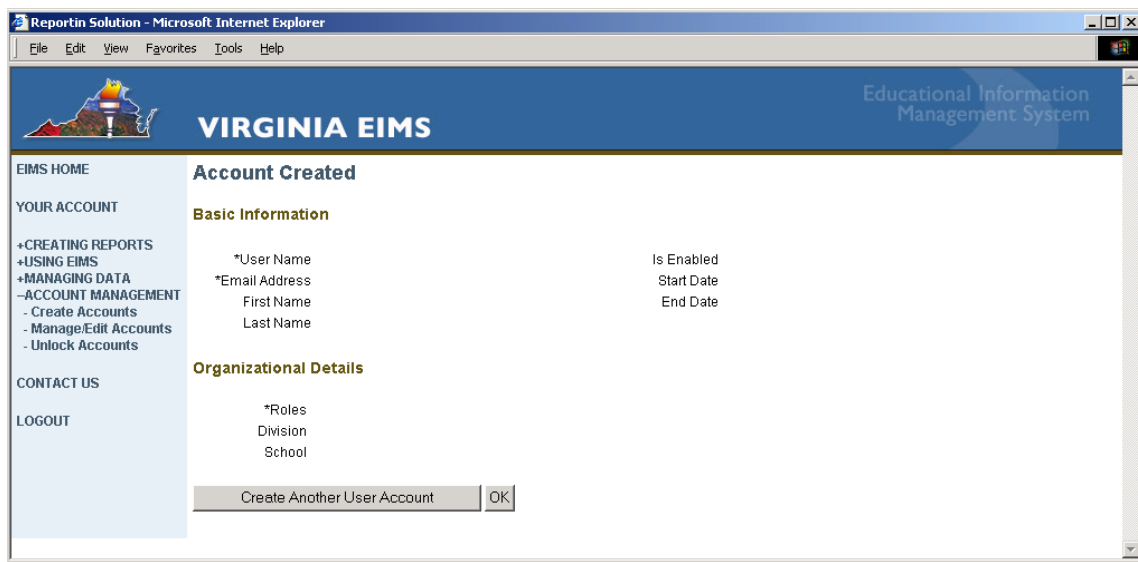

Figure 12 - Create Account Confirmation Page

Clicking the "Create Another User Account" button returns the user to a new Create Account page. The OK button returns control to the originating page.

The line above User Name field on the Create Account Page is reserved for system messages. If account creation fails for any reason, a message is displayed on this line.

The following table shows potential system messages during account creation.

Event	Message
Duplicate user name	Error: User already exist
User name > 30 characters	Error: User name must be <= 30 characters
Invalid character in user name	Error: User Name must consist of alphanumeric characters only
Missing mandatory field	Error: Mandatory field needs to be entered
Start date > end date	Error: Start date must be <= end date

Event	Message
Invalid Date Format	Error: Invalid Date Format
Missing Division for school level role	Error: Division must be entered for school level role
Missing School for school level role	Error: School must be entered for school level role

Table 7 - Create Account Error Messages

6.0   Edit Account Page

When Account Managers click on Manage/Edit Accounts, the user search screen is displayed as shown below.

Figure 13 - Search for User Page

The account manager can enter username (partial entry permitted) and hit the Go button to display a list of users available for update. This list of users displayed is sorted by user name and it confirms to access permission rules. The following rules are enforced:

1. State Account Managers can see all users in the State, except other State Account Managers.

2. Division Account Managers see only users in their Division except other Division Account Managers.

3. School Account Managers see only users in their school except School Account Managers.

The user selects a user to change, and then clicks the Edit button to display the **Edit Account Page. (See Figure 14)**

Figure 14 - Edit Account Page

The Edit Account Page is used by Account Managers to change Basic and Organizational user's information. This page cannot be used to change password information, i.e. password and password hint.

The functional behavior of this page is the same as Create Account page described earlier. Upon successful update of the user's account a confirmation page 'Edit Account' message is displayed as shown below

Figure 15 - Account Updated Confirmation Page

Clicking the OK button returns control to the Search for user page.

After the user is successfully updated within EIMS, the system updates the EIMS database with the new organizational information. Please see further technical details discussed in the Create Account section above.

7.0 Unlock Account Page

Account managers will have access to Unlock Account Page. Account managers use this page to unlock user accounts visible to them. A user account could be automatically locked if the user had more than 5 failed login attempts.

The Unlock Account page is accessed from the main navigation toolbar. When the account manager clicks on the Unlock Accounts link, the user search page is displayed as shown below.

Figure 16 - Search for Locked Account Page

The account manager selects a user to unlock, and then clicks the "Unlock" button to unlock account. Unlocking the account does not reset the user's password. The user will be able to login with the same password that they previous had contained.

Upon successful unlock, a confirmation page is displayed.

Figure 17 - Account Unlocked Confirmation Page

Clicking the OK button returns control to the Search for Locked User Accounts. (**Figure 18**)

8.0 Logging Out of EIMS

Reporting Solutions was developed to recognize if you have logged into EIMS and will continue to keep you logged in until 1 of 2 things happens:

1) You decide to log out of the system
2) You have left the system for 30 minutes with no activity performed within the site

The following steps will document both types of scenarios:

1. Click the *Log Out* button in the navigation section of the main page. This will log you out of EIMS. Once you click *Log Out*, the button changes to display *Log In*. Follow the same process as outlined in Section 2.0 to log back into EIMS.

2. If you have performed no activity within EIMS for at least 30 minutes, the system ends your session. If you try to perform an activity within EIMS after this time, you will be prompted to log back into the system.
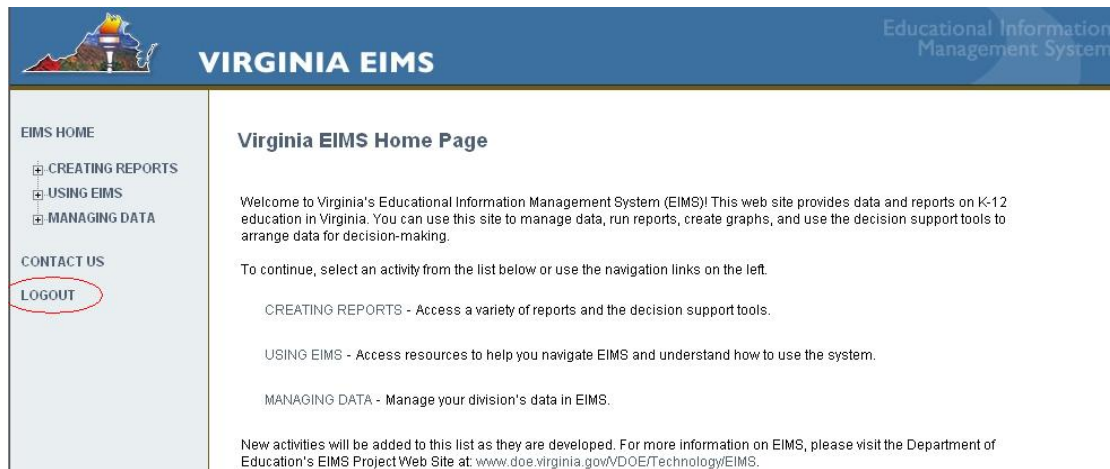
Figure 3 – Log Out Button

Figure 18 – Virginia EIMS Home Page

To log back in the system, follow the same steps as outlined in Section 2.0.